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FinancialPlanning

Wealthtech Weekly

October 30, 2025

By Rob Burgess
Reporter

Greetings from Sin City! I'm here at ADVISE AI at the Wynn Las Vegas. Yesterday, Michael Kitces and Suzanne Siracuse kicked things off with a fireside chat about the state of AI in wealth management.

Kitces said advisors are still figuring out where the tools can be most helpful in their technology stacks, but AI is not fully integrated into most advisors' daily workflows.

"It's not a sidekick buddy for the mainstream advisor," he said.

Where is AI most useful for you? Let me know — robert.burgess@arizent.com.

I hope you'll check out these articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

WEB SEMINAR

Serving the whole client: Why holistic wealth management is the future of advice

Hosted by Financial Planning

Partner Insights from Vanilla

November 11, 2025 | 2 p.m. ET/11 a.m. PT

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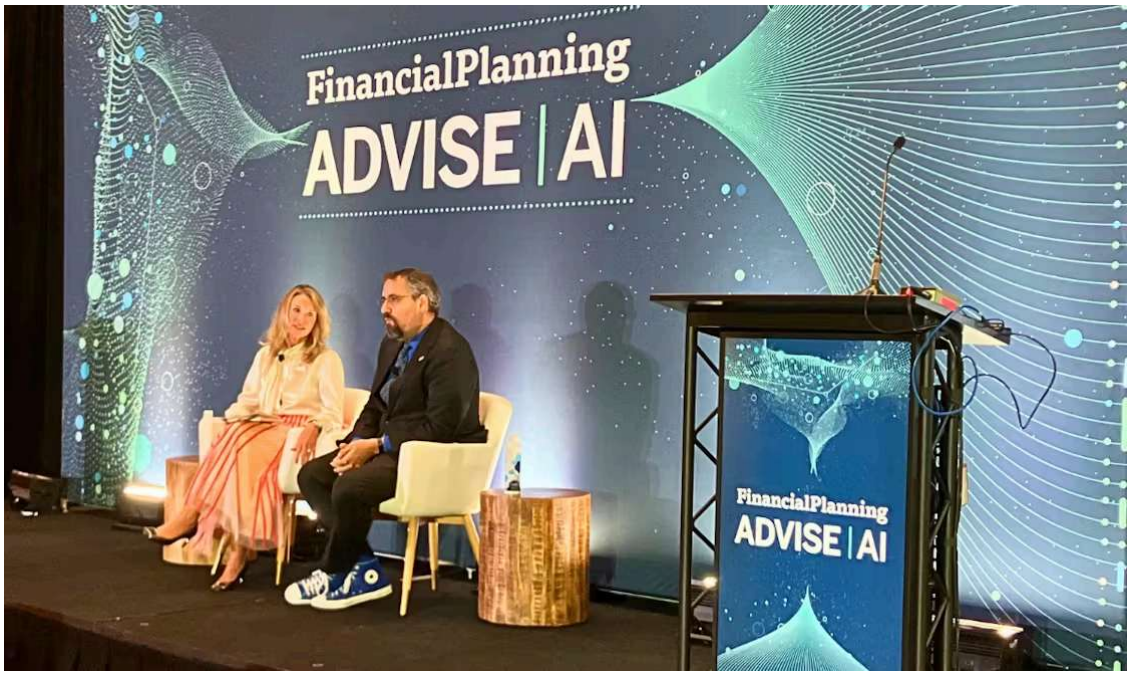
TOP STORIES

ADVISE AI

Advisors still in 'collective dabbler' stage of AI adoption: Kitces



During the opening session of Financial Planning's second annual ADVISE AI Conference, the chief financial planning nerd at Kitces.com took stock of where advisors are, and aren't, adopting the technology in their practices.

- **What's stopping most advisors from providing tax planning?** Nearly half of advisors are considering adding this service, according to the Financial Planning's October Financial Advisor Confidence Outlook.
- **Despite AI's allure, client relationships remain the crux of advisors' work**

Even with all the advancements in artificial intelligence in the past few years, Financial Planning's new research shows human connection remains at the center of advisors' work.

- **The 10 best and worst health care funds of the past year**
  Recent headlines may illuminate why this sector is particularly volatile, but advisors say they have been instructing clients that not all health care funds are created equal.
- **Raymond James reports record advisor headcount in earnings call**
  The independent broker-dealer has done especially well recruiting Commonwealth advisors since that firm's acquisition by LPL Financial.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EQUITABLE ADVISORS

Maintaining firm autonomy when sharing technology, people and processes

In this Q&A article with David Karr, chairman of Equitable Advisors, gain perspective on how financial advisors can leverage shared resources and lean into AI to more efficiently.

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